

PD-AAU-964

48885

PROGRESS REPORT (OCTOBER 1, 1986 - DECEMBER 31, 1986)

CONTRACT NUMBER: 511-0580-C-00-6087-00

PROJECT NUMBER: 511-0580

PROJECT TITLE: BOLIVIA MANAGEMENT TRAINING PROJECT

INSTITUTE FOR RESOURCE DEVELOPMENT, INC.

A WESTINGHOUSE COMPANY

P.O. BOX 866

COLUMBIA, MARYLAND 21044

USA

## I. ACTIVITIES OCTOBER 1, 1986 - DECEMBER 31, 1986

### PROJECT MANAGEMENT

As indicated in the report detailing project activities from project inception through September 30, 1986, a project management meeting including representatives from IDEA, USAID/Bolivia and IRD/Westinghouse was scheduled for early November in order to conduct full-scale clarification and planning on the technical assistance effort. The IRD Project Manager resigned from the project on October 9, 1986 and was replaced by Acting Project Manager Kent Hatley.

The week of meetings between IDEA, USAID/Bolivia and IRD began at the IDEA offices on November 10, 1986. The IRD team (Kent Hatley and Susan McInturff, Project Administrator) met with the following people during the course of the week:

- IDEA
  - Board of Directors, headed by Chairman Jorge Lonsdale
  - Hector Encinas, Executive Director
  - Magda Lahore, Academic Director
  - Alvaro Monasterios, Financial Director
  
- USAID
  - Gerard Bowers, Chief, Health and Human Resources Division
  - Michael Snyder, Regional Contracting Officer
  - Bambi Arellano, Project Officer

The main points which emerged from the meetings were as follows:

1. IDEA, USAID and IRD/Westinghouse agreed that the short term technical assistance provided by IRD/Westinghouse had been very good, but that a person with a different combination of skills would better serve the project as the IRD/Westinghouse Chief of Party.
2. There was general misunderstanding of what technical assistance had actually been included in the technical assistance contract. IDEA had assumed that everything in the proposal was automatically included in the contract, and that therefore IRD/Westinghouse was obligated to perform all services suggested in its proposal. IRD/Westinghouse explained to IDEA that the proposal presented a framework for managing the entire project, not just those portions on which technical assistance would be rendered. There had been no negotiation of a technical scope of work for this contract; therefore, those on both sides concerned with the technical scope had never come to closure on exactly what technical assistance was needed, and several items had been cut during contract negotiations. The contract itself provided funding solely for IRD and independent consultant labor and their related expenses. No funding was provided for subcontracts for other organizations or for the search for and acquisition of materials. Neither IDEA nor USAID/Bolivia had ever seen a copy of the detailed budget.
3. A disappointing needs assessment had been conducted by an outside organization before the start-up of the IRD/Westinghouse contract. The IDEA Academic Director, with some assistance from the IRD/Westinghouse Chief of Party, had designed a training needs survey instrument for medium and large scale business which was to be administered in December 1986. IRD/Westinghouse consultant Tonia Papke had designed and had begun administering a needs assessment survey instrument for small and micro businesses. Although there was

some disagreement about whether work should be curtailed until a full-scale needs assessment could be designed and completed, it was decided that the project should proceed on the basis of the two assessments already designed. The need for further needs assessment would be determined at a later date.

4. IDEA wanted to establish institutional relationships with training organizations in order to access consultants, training materials, and other resources. As subcontracts would be expensive, it was determined that they would be used selectively, assuming that the IRD/Westinghouse contract could be amended to permit their use.
5. In an effort to clarify exactly what technical assistance was needed for the project, the IDEA Executive and Academic Directors, the USAID Project Officer and the IRD/Westinghouse team went through the tasks listed in the IRD/Westinghouse proposal and clarified with IDEA how they wanted the technical assistance allocated. A timeline for provision of short-term technical assistance was produced. Formal institutional relationships with other Latin American training institutions would be sought, and several consulting assignments were allocated to these institutions. It was not determined at the time whether the full number of consulting months desired by IDEA could be delivered within the remaining budget of the project, particularly if subcontracts were to be awarded.
6. Although IDEA proposed that all future technical assistance be short-term, IRD/Westinghouse maintained that a long-term person was absolutely essential for the coordination of the technical assistance. A compromise was reached in agreeing that for the following year, a Chief of Party would be sought who could fill close to a person-year of the short-term assignments needed by IDEA. The remainder of his time would be devoted to ongoing identification of needs for short-term technical assistance, supervisory and administrative functions related to short-term consultants, and liaison among IRD/Westinghouse, IDEA, and USAID/Bolivia.

Following this series of meetings, USAID, by letter dated November 28, asked IRD/Westinghouse to develop within 90 days an action plan for technical assistance, including names, qualifications, and time frames, and to demonstrate its ability to generate the requested institutional relationships.

#### SANTA CRUZ BRANCH

The inauguration of IDEA's Santa Cruz branch was held at the end of the week of meetings. The IRD/Westinghouse Chief of Party performed his last official function by giving a Human Resources presentation in Santa Cruz on the evening of November 13. His last day of work at IDEA was November 14, and he departed the country in early December. The IRD/Westinghouse Acting Project Manager concluded his meetings with the IDEA Board of Directors and Executive Staff in Santa Cruz.

#### INSTITUTIONAL RELATIONSHIPS

On December 12, IRD/Westinghouse issued a Request for Proposals to 20 organizations doing business with the private sector in Latin America. The RFP anticipated the selection of at least two Indefinite Quantity Contractors, one for an organization providing management training services to micro and small businesses and one for an organization providing such services to medium and large scale business. The RFP also indicated interest in locating independent consultants and sources of training materials.

The remainder of the quarter was devoted to initial development of the technical assistance plan requested by USAID/Bolivia.

## TECHNICAL ASSISTANCE

Three IRD/Westinghouse consultants were in-country during this quarter.

Luis Carlos Rodriguez submitted the Business Plan for IDEA in early October.

On October 2, George Garcelon arrived in Bolivia to provide technical assistance on Financial Management. He analyzed IDEA's accounting system and found it to be efficient. He produced a computerized budgeting system, undertook a task analysis for the financial department, and demonstrated the need to add staff for performing the financial management function. Mr. Garcelon also presented a computer course.

Tonia Papke, the IRD/Westinghouse consultant in Small Business, arrived in Bolivia on November 3 to design and conduct a needs assessment for small and micro business. Upon her return to the United States in late November and continuing into January, she was to prepare a report of results of the needs assessment, identify topics for training modules, identify training materials available in Spanish to support these topics, and write a complete module on one topic (single entry accounting).

## II. PROJECTED ACTIVITIES JANUARY 1, 1987 - MARCH 31, 1987

### TECHNICAL ASSISTANCE PLAN

The major activity for the quarter is expected to be production of the Technical Assistance Plan, including recruitment and selection of long and short term staff and two or more IQC contractors.

The due date for responses to the IQC RFP is January 12, 1987. Copies of all proposals will be sent to Bolivia for recommendations. Candidates for the new IRD/Westinghouse Chief of Party position will be screened, and finalists will be sent to La Paz for interviews.

During the project review meetings held in La Paz in November, IDEA consistently expressed a desire to have more true Westinghouse involvement in the project. Accordingly, every effort will be made to recruit Westinghouse employees or consultants who have worked extensively with Westinghouse in the past.

A draft of the Technical Assistance Plan is expected to be submitted in late January or early February in order to elicit the comments of IDEA and USAID/Bolivia. The final version of the plan will be submitted in late February or early March. Revised costing will be submitted with the final version of the plan, assuming that the selections of the IQC contractors and of the new Chief of Party have been made by that time.

IRD/Westinghouse consultant Tonia Papke will complete her report on the small and micro business training needs assessment along with her recommendations on the training courses which need to be developed to respond to those needs.

APPENDIX A

REQUEST FOR PROPOSALS FOR  
INDEFINITE QUANTITY CONTRACTS,  
INDEPENDENT CONSULTANTS AND  
TRAINING MATERIALS



Westinghouse  
Electric Corporation

Institute For  
Resource Development

PO Box 866  
American City Building  
Columbia Maryland 21044  
(301) 992-0066-0866  
TELEX: 87775

DATE RELEASED: December 12, 1986  
CLOSING DATE FOR ORGANIZATIONS ONLY: January 12, 1987, at 1700 hours  
Eastern Standard Time  
RFP NO.: IRD47564-1

The Institute for Resource Development, Inc. (IRD), a wholly owned subsidiary of Westinghouse Electric Corporation, is under contract to the United States Agency for International Development to provide technical assistance to the Instituto de Desarrollo de Empresarios y Administradores (IDEA) in Bolivia. Through the contract with Westinghouse IRD, IDEA is interested in developing both formal and informal relationships with other management training organizations doing business primarily with the private sector in Latin America. It is also interested in locating specific independent consultants who can provide both consulting and training services and in discovering sources of training materials (including audiovisuals) for short-term management training in Spanish.

Organizations, individuals, and suppliers of training products are invited to respond to this solicitation as follows:

ORGANIZATIONS--Submit an original and two copies of your proposal so that they are received by the announced closing date. It is expected that at least two contracts will be awarded, one to an organization providing management training services primarily to medium and large scale businesses and one to an organization providing such services to micro and small businesses.

This RFP in no way obligates Westinghouse IRD to award any contract, nor does it commit Westinghouse IRD to pay any cost incurred in the preparation and submission of a proposal.

INDIVIDUAL CONSULTANT/TRAINERS--Submit an original and two copies of the documents specified as soon as possible. The credentials of those submitting their documents will be reviewed against specific consulting and training needs as they are identified, and those whose background and experience most nearly meet project needs will be contacted. Consulting agreements will be issued to those selected for specific assignments. Westinghouse IRD will not pay any cost incurred in the preparation and submission of your documents.

PROVIDERS OF OTHER MATERIALS--Submit 3 copies of the requested documents as soon as possible. The information provided will be used on a continuing basis. As project needs are identified, appropriate materials may be selected for review and/or purchase. Westinghouse IRD will not pay any cost incurred in the preparation and submission of your documents.

If you decide to submit a proposal or documents, use the following address for hand or courier delivery:

Institute for Resource Development, Inc.  
A Westinghouse Electric Company  
American City Building, Suite 400  
Wincopin Circle  
Columbia, MD 21044 U.S.A.

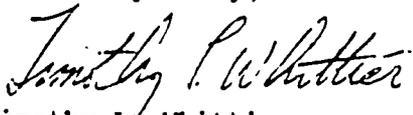
If you submit documents by mail, use the following address:

Institute for Resource Development, Inc.  
A Westinghouse Electric Company  
P.O. Box 866  
Columbia, MD 21044 U.S.A.

Proposals and documents may be submitted in either English or Spanish.

Telephone requests for information or clarification about this solicitation should be directed as follows: in English to Mr. R. K. Hatley or in Spanish to Mrs. S. McInturff or Mr. T. Finn. All may be reached at (301) 992-0066 or by telex at 87775 in Columbia, Maryland.

Yours very truly,



Timothy L. Whittier  
Contracts Manager

Enclosure

## PROJECT DESCRIPTION

The Instituto de Desarrollo de Empresarios y Administradores (IDEA) is a new organization providing short-term management training and other business services primarily to private sector businesses in Bolivia. Although the initial funding for the organization is being underwritten by the United States Agency for International Development (USAID), IDEA will strive to become economically self-sufficient within approximately 3 years of its founding. IDEA is headquartered in La Paz with branches in Cochabamba, Santa Cruz and other Bolivian cities. It should be emphasized that IDEA will be providing only short-term training courses and does not intend to become an academic degree-granting institution.

For medium and large businesses, IDEA will provide short-term training for mid-level and senior-level managers as well as for first-line supervisors and administrative personnel who undertake quasi management duties. Such training is expected to be given both in public courses as well as in courses tailored specifically to the needs of a particular client organization. A variety of training formats will be used. The range of course topics is broad and might include, for example, such areas as management by objectives, supervisory skills, employee evaluation, interview techniques, personnel management, marketing management, sales management, financial management for non-financial managers, production management, inventory systems, operation of Kardex systems, plant layout, export marketing, microcomputer business applications, etc.

For small and micro businesses, training at IDEA will largely be focused on developing specific business skills which are critical to the financial success of such entities. Because the cost of such courses must necessarily remain low, training groups will often be larger than those coming from larger businesses, and training methodologies must be appropriate to this larger class size. Trainees in this category may also be expected to have had less formal education than those from medium and large businesses.

IDEA also desires to develop a Resources and Business Services Center. The Center would serve as a major information resource for member organizations, providing access to the latest business journals as well as to films and videotapes on business topics. The Center would also develop specific business services to raise revenue for the organization. For example, a microcomputer center might be developed and usage time sold to business organizations. Courses in microcomputer applications might be offered. A word processing center might be developed. Consulting services might be developed to complement the training services offered by the organization. A feasibility study will be undertaken to explore the various options for the Center and the revenue potential of each.

The Institute for Resource Development, Inc., a wholly-owned subsidiary of the Westinghouse Electric Corporation, is providing assistance to IDEA during the first three years of its existence, primarily by bringing highly qualified short-term technical consultants and trainers to help the Bolivian staff during the start-up phase.

Realizing that a number of Latin American organizations have had direct experience in providing the kind of training services which IDEA will be providing in Bolivia, IDEA is specifically interested in benefitting from the collective experience of such organizations so that it does not spend its time developing what is already available elsewhere.

Accordingly, IDEA has requested Westinghouse IRD to seek specific information from Latin American training organizations and individuals who would be interested in providing products and/or services to IDEA. The following information is provided to guide responses to this request for costing information:

## ORGANIZATIONS

Organizations providing consulting and training services would work with IDEA through an Indefinite Quantity Contract (IQC) with Westinghouse IRD. As consultant/trainer needs are identified, IDEA and Westinghouse will develop a specific scope of work for the consultancy and training course(s). A copy of the scope will be sent to each organization holding an IQC, together with a request that within a specified period of time they nominate one or more individuals to undertake the work. Westinghouse will reimburse the organization for the approved consulting fee. Westinghouse will reimburse the consultant directly for approved expenses conforming to USAID rules.

Interested organizations should provide the following information:

### A. Capability Statement

Organizations should provide a description of their organization, the courses they offer, the client groups with which they deal, ancillary services they offer, and any experience they have had in providing consulting and/or training services to similar organizations. Any specialized services or facilities, such as a learning resource center or business services center, should be described. Standard brochures plus project descriptions should be sufficient unless specialized information is not included in the brochures.

B. Rates

The following information must be provided for the proposed rates:

- Base rate(s) to be charged per day worked and the basis for establishing that rate(s). If prices are quoted in local currency, show the current exchange rate to the United States dollar. Only days worked may be charged.
- Organizational markup, if any, and the components of that markup.
- If the organization has previously done any work for USAID or other agencies of the U.S. Government, a comparison of the rates quoted in this proposal to those used in previous work with the U.S. Government.

C. Curricula Vitae and USAID Biodata Forms

Provide curricula vitae for up to 20 persons who would potentially be available for consulting/training assignments in Bolivia for periods of one month or longer. A copy of the USAID Contractor Employee Biographical Data Sheet form AID 1420-17 must be completed for each person and attached to the CV. A blank copy of this form is attached.

D. Training Course Documentation

Consultant/Trainers working on this project will be expected to leave completely documented copies of all course modules which they present along with a copy of all course materials and audiovisuals so that IDEA trainers will be able to deliver the course themselves in the future. All written materials must be in Spanish. The course materials and audiovisuals to be used for each proposed course must be described, and the prices must be quoted in United States dollars.

**E. Products**

List, provide descriptive materials and show the price for products which could be purchased directly by IDEA. All written materials must be in Spanish. Products of particular interest include the following:

- Fully developed training modules
- Course outlines
- Course notebooks
- Specialized audiovisuals
- Videotapes or films
- Correspondence courses
- Training-related publications of the organization

**F. References**

If the organization has provided specific consulting or training services to outside organizations within the last three years, provide a brief description of the services, the complete name of the organization, contract amount, names and telephone numbers of the technical and contract representatives of the client organization.

**G. Specific Nominations**

Organizations which have nominees for any of the specific consultancies identified in the attached scopes of work should include their nominations with this submission. These scopes of work represent legitimate and immediate needs of IDEA and are expected to be the first work orders issued under the proposed IQC's.

## INDIVIDUALS

Individuals responding to this request are making their names available for consideration as independent consultants/trainers. This category includes independent consultants as well as individuals from other organizations who are permitted to do outside consulting.

### A. Curriculum Vita and Biodata Form

Individuals should provide a complete curriculum vita and a USAID Contractor Employee Biographical Data Sheet form AID 1420-17. Be certain that the CV or an attachment gives a complete description of training courses you have previously taught and the materials which accompany the course. If the individual has previously worked as a consultant for a USAID-funded project, show the USAID-authorized fee received for that consultancy. Each consultant must provide at least three references from clients for whom consulting and training services have been provided.

### B. Training Course Documentation

Consultant/Trainers working on this project will be expected to leave completely documented copies of all course modules which they present along with a copy of all course materials and audiovisuals so that IDEA trainers will be able to deliver the course themselves in the future. All written materials must be in Spanish. The course materials and audiovisuals to be used in each proposed course must be described, and the prices must be quoted. If prices are quoted in local currency, show the current exchange rate to the United States dollar. Individuals will also be expected to share the non-confidential experience of any organizations by whom the person has been employed.

## OTHER PROVIDERS OF MATERIALS

Individuals or organizations who have specific products or materials potentially of use to IDEA are encouraged to submit relevant information. All written materials must be in Spanish. List, provide descriptive materials and show the price for products which could be purchased directly by IDEA. If prices are quoted in local currency, show the current exchange rate to the United States dollar. Products of particular interest include the following:

- Fully developed training modules
- Course outlines
- Course notebooks
- Specialized audiovisuals
- Videotapes or films
- Correspondence courses
- Training-related publications of the organization

ORGANIZATIONAL CONSULTANCY NO. 1

INSTITUTE FOR RESOURCE DEVELOPMENT, INC.  
A WESTINGHOUSE ELECTRIC COMPANY  
BOLIVIA MANAGEMENT TRAINING PROJECT

CONSULTANT SCOPE OF WORK

AREA OF EXPERTISE REQUIRED: Curriculum development for short-term management training for medium and large businesses

TASKS/OBJECTIVES FOR THIS ASSIGNMENT:

Using results of a needs assessment recently completed in Bolivia, Consultant shall develop specific lists of course titles for marketable short-term management training courses for employees of medium and large scale businesses at the level of senior and mid-level managers, first line supervisors and white collar workers carrying out quasi-management functions. Consult with the Academic Director and Executive Director of IDEA to select specific titles from that list to develop the core curriculum and additional courses for this type of clients.

For each core course, develop specific learning objectives, course outlines, and course descriptions. Suggest the most appropriate training methodologies. Suggest which core and additional courses need to be developed and which could be acquired from other sources. Identify the sources of such courses. Fully develop core courses within the consultant's area of expertise. Include audiovisuals, course notebooks and handouts. Deliver at least one of the courses developed.

Determine the need for further needs assessment and make specific recommendations on the form such assessment should take.

DELIVERABLES: List of suggested courses; core curriculum and list of additional courses; learning objectives, course outlines and course descriptions for each core course; recommendations on outside acquisition of course modules; complete course modules; recommendations on needs assessment; final report before leaving country; 3 presentations of one core course.

ESTIMATED NUMBER OF DAYS OF CONSULTING FEE: 88

PROPOSED DATES OF CONSULTATION: 1 FEBRUARY--31 MAY 1987 with arrival in Bolivia on or about 1 February.

ORGANIZATIONAL CONSULTANCY NO. 2

INSTITUTE FOR RESOURCE DEVELOPMENT, INC.  
A WESTINGHOUSE ELECTRIC COMPANY  
BOLIVIA MANAGEMENT TRAINING PROJECT

CONSULTANT SCOPE OF WORK

**AREA OF EXPERTISE REQUIRED:** Curriculum development for short-term management training for small and micro businesses

**TASKS/OBJECTIVES FOR THIS ASSIGNMENT:**

Using results of a needs assessment recently completed in Bolivia, Consultant shall develop lists of course titles for marketable short-term management training courses for employees of small and micro businesses, including small entrepreneurs. Consult with the Academic Director and Executive Director of IDEA to select specific titles from that list to develop the core curriculum and additional courses for this type of clients.

For each core course, develop specific learning objectives, course outlines, and course descriptions. Suggest the most appropriate training methodologies. Suggest which core and additional courses need to be developed and which could be acquired from other sources. Identify the sources of such courses. Fully develop core courses within the consultant's area of expertise. Include audiovisuals, course notebooks and handouts. Deliver at least one of the courses developed.

Determine the need for further needs assessment and make specific recommendations on the form such assessment should take.

**DELIVERABLES:** List of suggested courses; core curriculum and list of additional courses; learning objectives, course outlines and course descriptions for each core course; recommendations on outside acquisition of course modules; complete course modules; recommendations on needs assessment; final report before leaving country; 3 presentations of one core course.

**ESTIMATED NUMBER OF DAYS OF CONSULTING FEE:** 88

**PROPOSED DATES OF CONSULTATION:** 1 FEBRUARY--31 MAY 1987 with arrival in Bolivia on or about 1 February.

## CONTRACTOR EMPLOYEE BIOGRAPHICAL DATA SHEET

(SEE PRIVACY ACT STATEMENT ON REVERSE)

**INSTRUCTIONS:**  
Submit in triplicate to contracting officer.  
See reverse for Contractor Certification.

|   |   |  |                            |                           |
|---|---|--|----------------------------|---------------------------|
| 1. Name (Last, First, Middle) <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs. <input type="checkbox"/> Miss <input type="checkbox"/> Ms. |   | 2. Contractor's Name   |                            |                           |
| 3. Address (include ZIP Code)   |   | 4. Contract No.  | 5. Position Under Contract |                           |
| 8. Telephone Number (include area code)   |   | 6. Proposed Salary   | 7. Country of Assignment   | 8. Duration of Assignment |
| 12. Date of Birth   | 10. Marital Status<br><input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Other (specify) | 11. Names and Ages of Dependents to Accompany Individual (if applicable) |                            |                           |
| 14. Citizenship (if non-U.S. citizen, give visa status)   |   | 13. Place of Birth   |                            |                           |

### 15. EDUCATION (include all secondary, business college or university training)

| NAME AND LOCATION OF INSTITUTION | MAJOR SUBJECTS | Credits Completed |              | Type of Degree | Date of Degree |
|----------------------------------|----------------|-------------------|--------------|----------------|----------------|
|                                  |                | Semester Hour     | Quarter Hour |                |                |
|                                  |                |                   |              |                |                |
|                                  |                |                   |              |                |                |
|                                  |                |                   |              |                |                |
|                                  |                |                   |              |                |                |

### 16. EMPLOYMENT HISTORY

1. Give last three (3) years. Continue on reverse to list all employment related to duties of proposed assignment.
2. Salary definition - basic periodic payment for services rendered.  
Exclude bonuses, profit-sharing arrangements, commissions, consultant fees, extra or overtime work payments, overseas differential, or quarters, cost of living or dependent education allowances.

| POSITION TITLE | EMPLOYER'S NAME AND ADDRESS | Dates of Employment (Mo., Yr.) |    | Salary  |      |
|----------------|-----------------------------|--------------------------------|----|---------|------|
|                |                             | From                           | To | Dollars | Per. |
|                |                             |                                |    |         |      |
|                |                             |                                |    |         |      |
|                |                             |                                |    |         |      |
|                |                             |                                |    |         |      |

### 17. SPECIFIC CONSULTANT SERVICES (give last three (3) years)

| SERVICE PERFORMED | EMPLOYER'S NAME AND ADDRESS | Dates of Employment (Mo., Day, Yr.) |    | DAILY RATE |
|-------------------|-----------------------------|-------------------------------------|----|------------|
|                   |                             | From                                | To |            |
|                   |                             |                                     |    |            |
|                   |                             |                                     |    |            |
|                   |                             |                                     |    |            |
|                   |                             |                                     |    |            |

### 18. LANGUAGE PROFICIENCY

| LANGUAGE | Speaking |      |       | Reading |      |       | Writing |      |       | Understanding |      |       |
|----------|----------|------|-------|---------|------|-------|---------|------|-------|---------------|------|-------|
|          | Fair     | Good | Excl. | Fair    | Good | Excl. | Fair    | Good | Excl. | Fair          | Good | Excl. |
|          |          |      |       |         |      |       |         |      |       |               |      |       |
|          |          |      |       |         |      |       |         |      |       |               |      |       |
|          |          |      |       |         |      |       |         |      |       |               |      |       |

19. Special Qualifications (honors, professional societies, special licenses, publications, research, special skills, and relevant education not previously mentioned; use reverse side of form, if necessary)

20. CERTIFICATION: To the best of my knowledge, the above facts as stated are true and correct.

Signature of Employee

A-12

Date

**CONTRACTOR'S CERTIFICATION** (To be completed by responsible representative of Contractor)

A. I hereby certify that ('X' appropriate box):

- The initial salary proposed herein meets the salary standards prescribed in the contract.
- The salary increase proposed herein conforms to the customary policy and practice for this organization for periodic salary increases.

B. Justification or Remarks

|           |       |      |
|-----------|-------|------|
| Signature | Title | Date |
|-----------|-------|------|

**PRIVACY ACT STATEMENT**

The following statement is required by the Privacy Act of 1974 (Public Law 93-579; 88 Statute 1896).

The information requested on this form is needed by AID to evaluate your suitability for the position for which you have been nominated as a contract employee. It is necessary that you provide the information for AID to consider your nomination. The Foreign Assistance Act of 1961, as amended, constitutes authority for its collection.

Employers and educational institutions you list may be contacted for verification of the information provided. Disclosure may otherwise be made in whole or in part to any (a) foreign government concerned if required by that government in connection with their review of your nomination and (b) pursuant to any other applicable routine use listed under AID's Civil Service Employee Office Personnel Record System, AID-2 in AID's Notice of Systems of Records for implementing the Privacy Act as published in the Federal Register, or (c) when disclosure without the employee's consent is authorized by the Privacy Act and provided for in AID Regulation 13. (A copy of the Regulation and Notice of System of Records is available from AID Distribution on request.)

APPENDIX B

LATIN AMERICAN

TRAINING INSTITUTIONS

RECEIVING REQUEST FOR PROPOSALS FOR

INDEFINITE QUANTITY CONTRACT

Management Training Institutes - Latin America

1. Centro de Formacion Empresarial (CEFE)  
Avenida Orellana 1682  
9 de Octubre  
Quito, Ecuador  
593-2-233410  
-528103  
-529301

Contact Person: Nicolas Peres or Patricio Izurieta (President)

Mail RFP to: Nicolas Peres                      Casilla 3476  
Centro de Formacion Empresarial              Quito, Ecuador

CEFE provides training for private and public managers in all areas of management, including, e.g., production management, sales, human resources, financial management.

REF: Jill Kohler, Land O' Lakes Development Manager. (Does not know CEFE; got recommendation from visiting Ecuadorean delegation)

2. Tecnologia Administrativa Moderna, S.C. (TEAM)  
Avenida Leon Felipe 42                      14206 Arbor Oak  
Alvaro Obregon                              Shavano Oaks  
01040 Mexico, D.F.                          San Antonio, TX 78249  
905/548-7889                                  (512) 493-1452  
Contact Person: J. Noel Osborn, Ph.D.  
President

In association with: Center for Creative Leadership (U.S.) and  
Universidad Internacional de Mexico, A.C.  
La Otra Banda N° 40  
Col. Tizapan, Alvaro Obregon  
01090 Mexico, D.F.  
(905) 548-7646 (905) 550-4073

Team is the CCF's agent for carrying out consulting in leadership and management in Mexico and Latin America. It has, however, provided supervisory skills training to first lines in companies such as Goodyear and Mennen in 6 Latin American countries.

REF: Sam Shelby, Westinghouse, Luis Rubio, IBAFIN. Shelby highly recommends them if focus is on individual development.

Management Training Institutes (con't)

3. Instituto de Capacitacion de Mandos Intermedios (ICAMI)

Mar Mediterraneo 183  
Col. Popotla  
Apartado Postal 11400  
Mexico, D.F.

Mexico  
905-274-759  
905-274-596

Contact Person: Lic. Conrado Antonio Larios  
Director General

ICAMI does management training in several areas for middle managers and supervisors. Its parent organization, IPADE, handles high level managers.

REF: Bo Dahlborg, Lat. Amer. Division, World Bank

4. Instituto Panamericano de Alta Direccion de Empresas (IPADE)

Floresta 20  
Col. Claveria 02080  
Mexico, D.F.

Mexico  
905-270-260

Contact Person: Lic. Sergio Raimond Kedilhac

REF: Bo Dahlborg, Lat. Amer. Division, World Bank

5. Universidad del Pacifico

Avda. Salavarry N<sup>o</sup> 20  
Lima 27  
San Isidro  
Lima, Peru  
5114712277  
5114729635

Mail RFP to Jorge Llosa Barber

REF: John Gillespie, Lil Gibbons, World Bank. Jorge Llosa runs a profit making consulting arm of U of P called SERCAUP and comes highly recommended. John believes he would be very anxious to help, even though there may be some tendency of the Peruvians to look down upon the Bolivians or a project in Bolivia.

6. Instituto de la Banca y Finanzas (IBAFIN)

Apartado Postal 94-bis  
Mexico 1, D.F.  
Mexico

Contact Person: Luis Rubio, Director

Mail RFP to above address. Official street address is:

Jaime Balmes N<sup>o</sup> 11  
Edificio B, 6<sup>o</sup>  
11510 Mexico, D.F.  
Mexico

Rubio says IBAFIN's two strong areas for our project would be in finance and in strategy and planning. Recommends TEAM and IESA (Venezuela, Kastner-for marketing)

7. Instituto de Estudios Superiores de Administracion (IESA)  
Apartado Postal 1941  
Caracas, Venezuela 1010A  
582-529957  
Contact Person: George Kastner  
IESA was recommended twice. Kastner is recommended by Luis Rubio for marketing courses.

IESA  
Apartado 1640  
Caracas 1010A  
Caracas, Venezuela  
Contact: Dr. Henry Gomez Samper, Director  
Dr. Gomez indicated that his programs were more based at the University. They do have executive development programs and substantial research, however, so Westinghouse might do well to appraise him of the project. He is sending us information on their programs.

Street Address: IESA  
Final Calle Occidente  
Edificio IESA  
San Bernardino  
Apartado 1640  
Caracas, Venezuela 1010A

8. Fundacao Getulio Vargas  
Praia de Botafogo N° 190  
22253 Rio de Janeiro, R.J.  
Brazil  
55215511542  
President: Dr. Luis Simoes Lopes  
REF: John Gillespie, Marcio Thome (Peru Health Project). Have not spoken with this group. Highly recommended, have 13 educational institutions, connected with the Brazilian Institute of Economics.

9. Instituto Tecnologico de Estudios Superiores de Monterrey (ITESM)  
Fray Servando Teresa de Mier N° 99  
Col. Obrera 06080  
Mexico, D.F.  
905782728  
Dean: Lic. Jorge Arreola Lopereina  
ITESM has campuses throughout Mexico, is a graduate school of administration supported by Harvard.  
REF: Bo Dahlborg, Lat. Amer. Division, World Bank

10. Asociacion Panamena de Ejecutivos de Empresa (APEDE)  
Apartado 1331 Avenida Balboa  
Panama 1 Calle 42  
Republica de Panama Edificio del Banco de Correa 3°  
27-3511;27-3902 Panama  
Telex 3009 COLSEPA,PG Republica de Panama  
Contact: Domingo de Obaldia  
Director Ejecutivo

11. Instituto de Desarrollo de Empresarios Argentinos (IDEA)  
Moreno Miller 350-3<sup>o</sup>  
1850 Capital Federal  
Buenos Aires, Argentina  
541-46-5492,0377, or 0820. 466014 is direct line to Hugo Ambrosio.  
Contact: Hugo Ambrosio (RFP to him)  
Director is Doctora Mabel Lopez

IDEA is 27 years old, provides training in a host of management areas, including strategic planning, MBO, finance, personnel, marketing.

12. Fundacion Carvajal  
Avda 2 N<sup>o</sup>2-22  
Centenario  
Cali, Colombia  
573 816042, or 6043  
Telex: 55555 CVJCL CO  
Contact Person: Rodrigo Guerrero, Director  
Jaime Carvajal

13. Instituto Peruano de Administracion de Empresas (IPAE)  
Avenida de la Marina  
Cuadra 16  
Pueblo Libre  
Lima 1, Peru  
Tel: 51-14-512233, 517777  
Contact: Dr. Antonio Palomino

14. Escuela de Administracion  
Universidad Catolica de Chile      Street Address:  
Casilla 274-V                              Avenida Libertador  
Correo 21                                      B O'Higgins 340  
Santiago, Chile                              Santiago, Chile  
Tel: 562-555-0058 Ext. 4336  
Contact: Sr. Antonio Kobacevic  
also: actually talked to Julio Galvez, Prof. of Finance

Do consulting to firms and also run an MBA Executive Development program for business execs. Some example skill areas include finance, marketing, strategic planning, MIS.

15. Escuela de Administracion  
Universidad de Chile  
Calle Biagonal Paraguay 257  
Santiago, Chile

Contact: Sergio Melnik, Director  
REF: Julio Galvez, Professor at Catholic U. (above)

16. Escuela de Administracion de Negocios para Graduados (ESAN)  
1698 Avenida de la Molina  
Monterrico Chico  
Apartado Postal 1846  
Lima 100  
Peru  
Tel: 35-1760  
Contact: Jorge Talavera, Dean

Created 1963 under Alliance For Progress. Trains public and private. Has documentation center and computer center.

17. Instituto Centroamericano de Administracion de Empresas (INCAE)  
Carretera la Garita  
Alajuela Antigua Racquet Club  
Apartado 960  
4050 Alajuela  
Costa Rica  
Tel: 41-22-55  
Contact: Marc Lindenberg, Director

Private, nonprofit graduate school of management established in 1964. Funded by AID and supported by Harvard Business School. Long term programs and shorter term MBA.

18. Accion International  
1385 Cambridge Street  
Cambridge, MA 02139  
617-492-4930  
Contact: William Burrus, Executive Director

Started in Venezuela in 1961. Concentration since 1973 on small and microenterprise development.

19. Creative Associates  
3201 New Mexico Avenue, NW  
Suite 270  
Washington, DC 20016  
202-966-5804  
Contact: Charito Kruvant

20. Management Sciences International  
600 Water Street, SW  
NBU 7-7  
Washington, DC 20024  
202-484-7170  
Contact: Marina Fanning